Actuarial Society *of* Greater New York

# 2019 ASNY SPRING MEETING – PRESENTER BIOS

## BIOS - General Sessions

### Albert J. Beer - St. John's University

**General Session:** Professionalism- Do You Really Understand What The ABCD Does?

In 2006, Mr. Beer retired as President of Munich Re America's Strategic Business Units. At that time he also served as Chairman, President and CEO of American Alternative Insurance Company and as Chairman, President and CEO of the Princeton Excess and Surplus Lines Insurance Company. Prior to joining Munich Re in 1992, Mr. Beer was Chief Actuary and Director of Alternative Risk for the Skandia America Group. From 1984 to 1989, Mr. Beer was a Partner with the consulting firm Tillinghast, a division of Towers, Perrin. Between 1976 and 1984, he held the position of Professor of Actuarial Science at The College of Insurance. Mr. Beer served as the Casualty Actuarial Society President in 1995 and has also served multiple times as a member of the Board of Directors of the Casualty Actuarial Society and the American Academy of Actuaries. From 2007 to 2013, he served as a member (and as Chair from 2010 to 2012) of the Actuarial Standards Board.

### Seong-min Eom- Life and Health NJ Department of Banking and Insurance

**General Session:** Bias Ethics in Models and Algorithms

Seong-min Eom, FSA, MAAA, PRM is Chief Actuary of Life and Health in New Jersey Department of Banking and Insurance. She has over 20 years of insurance industry experience as an actuary. She is currently the chairperson of American Academy of Actuary’s ERM/ORSA committee and a member of Data Science and Analytics Committee. She oversees all actuarial works in life and health insurance including insurers’ enterprise risk management practice review, monitoring insurance companies’ solvency matters, rates and forms issued in New Jersey, and sometimes getting involved in the company’s market conduct. She is an active member of various NAIC committees including LATF (Life Actuarial Task Force), Longevity Risk Subgroup, Variable Annuities Capital and Reserve Subgroup, Life Risk-Based Capital Working Group, Valuation Analysis Working Group, HATF (Health Actuarial Task Force) and etc.

### Hareem Naveed - Munich Re

**General Session:** Bias Ethics in Models and Algorithms

Hareem Naveed is a Data Scientist with Munich Re’s Integrated Analytics team, where she focuses on applying predictive models and machine learning to support underwriting analysis, mortality prediction, and claims management. Prior to joining Munich, she was a data science fellow at the University of Chicago’s Center for Data Science and Public Policy where she worked with police departments to implement early intervention systems. Hareem graduated with a Master’s degree in Mathematics from the University of Toronto.

### Robert D. Helfand - Office of the Connecticut Comptroller

**General Session:** Bias Ethics in Models and Algorithms

Robert ("Bert") Helfand is an attorney who has represented America's leading insurers and financial services companies in class actions, coverage disputes, regulatory proceedings, and commercial litigation. Mr. Helfand speaks and writes frequently about Big Data and insurance law: He has presented to organizations such as the National Association of Insurance Commissioners and the Property Casualty Insurers Association of America, while his articles have appeared in peer-reviewed journals and on the curriculum of the University of Connecticut School of Law. In April 2019, Mr. Helfand left private practice to join the Retirement Services Division of the Office of the Connecticut Comptroller.

Actuarial Society *of* Greater New York

## BIOS - BREAKOUT SESSION #1

### William Cember - Prudential

**Breakout Session 1a:** PBR: Where Things Stand & Considerations for Modeling

Bill Cember is an actuary at Prudential where he is responsible for the model development and testing of Prudential's life AXIS models used for PBR valuation, cashflow testing, forecasting, and capital management. Prior to Prudential, he worked in a variety of roles including at a large multinational insurer, a global macro hedge fund, and as a consultant. Bill is a Fellow of the Society of Actuaries and a member of the American Academy of Actuaries.

### Alexandre Lemieux - PwC

**Breakout Session 1a:** PBR: Where Things Stand & Considerations for Modeling

Alex is a member of the Actuarial Service group at PricewaterhouseCoopers LLP. Actuarial Services provides audit support and consulting services to the insurance industry, as well as other financial services companies. During his time with PwC Alex was the Actuarial lead of team helping large life insurance company complete an M&A from a Chinese purchaser leading the actuarial implementation of PRCGAAP (an IFRS17 reserving methodology). Alex is also the actuarial lead for the audit for the US business of a large, international insurance company reporting under IFRS and USGAAP. Currently, Alex has been helping Asian companies with IFRS17 implementation spending 2 months in Hong Kong, leading the LDTI and IFRS17 adoption of a large reinsurer, as well as continued support of PBR and tax reform initiatives.

### Simon Li - Oliver Wyman

**Breakout Session 1b:** Model Governance and Validation: Best Practices and Common Pitfalls

Simon Li is a Consultant with the Actuarial Practice of Oliver Wyman. He joined Oliver Wyman in June 2017 and has played key roles in a number of model validation, staff augmentation, and merger and acquisition projects. Simon's industry experience includes assumption development, valuation of life, DI and LTC products, and actuarial audits. Simon is an Associate of the Society of Actuaries.

### Mark Spong - Oliver Wyman

**Breakout Session 1b:** Model Governance and Validation: Best Practices and Common Pitfalls

Mark Spong is a Senior Consultant with the Actuarial Practice of Oliver Wyman. He specializes in GAAP targeted Improvement roadmap development, internal audit, risk and control frameworks. Mark joined Oliver Wyman in January 2019 after holding enterprise risk management and oversight roles as well as both internal and external auditing leadership positions. Mark is a Fellow of the Society of Actuaries, Chartered Enterprise Risk Analyst, and a Member of the American Academy of Actuaries.

### Nkenge Blue – Haven Life

**Breakout Session 1c:** Designing a Digital Insurance Product

Nkenge Blue is a Product Actuary at Haven Life, supporting their advisor platform. Prior to her role at Haven, she spent the first 5 years of her career at New York Life, where her last role was the Universal Life and Variable Universal Life pricing actuary. Nkenge holds a BS in Economics from The Wharton School at the University of Pennsylvania and is a Fellow of the Society of Actuaries and Member of the American Academy of Actuaries.

**Emily Johnson – Fabric**

**Breakout Session 1c:** Designing a Digital Insurance Product

Emily Johnson has been building startup technology in adtech, edtech, and fintech since 2008. She currently leads technical and insurance product development at Fabric, a platform that offers new parents a suite of digital native financial products to support their changing needs as a family, including term life insurance. Formerly, Emily led direct-to-consumer products at Haven Life, a digital group within MassMutual, founded a two-sided marketplace startup, Tutorlist, and led enterprise products at LearnVest, a financial planning platform acquired by Northwestern Mutual.

**Gabe Diaz – Haven Life**

**Breakout Session 1c:** Designing a Digital Insurance Product

Gabe Diaz is a reformed financial services consultant turned product manager. He’s worked at NBCUniversal, Amazon and IAC delivering unusual and delightful digital experiences to customers. Now in his third year at Haven Life, Gabe works on translating the byzantine complexity of insurance products into something customers (and advisors) can manage in a digital space. Gabe may be the only millennial on the planet who finds whole life insurance exciting.

## BIOS - BREAKOUT SESSION #2

### Nazir Valani - Valani Global

**Breakout Session 2a:** Actuaries & Entrepreneurship

Nazir is President & Co-Founder of Valani Global. Valani Global is a global actuarial consulting firm which was formed in January 2019 and is based in Toronto and New York. Before starting Valani Global, Nazir worked at KPMG LLP Partner & North American Leader, AXIS Implementation. He was also the National Leader for the Canadian Actuarial Practice. Prior to KPMG, Nazir started a life actuarial consulting firm and developed it from a one-person shop to the second largest life actuarial practice in Canada. He worked in the insurance industry and an actuarial software company prior to this. Nazir received the SOA President's Award in 2018 and was featured in an SOA "Society of Achievers" video.

### Scott Houghton - Valani Global

**Breakout Session 2a:** Actuaries & Entrepreneurship

Scott Houghton is Vice President & Consulting Actuary at Valani Global Inc. Scott has previously worked as Principal at the Actuarial Practice of Oliver Wyman, VP of Insurance Consulting Services at Aon, and has also held roles at KPMG, Valani Consulting, John Hancock, and Boston Mutual Life. Scott is a member of the SOA Modeling Section Council and the past chair of the council. Scott is a graduate of Dickinson College, and is an FSA and MAAA.

### Ailen Okharedia - PwC

**Breakout Session 2b:** Targeted Improvements

Ailen is a director in PwC's Actuarial Services practice, based out of the New York City office. He has more than ten years of experience in financial reporting. His current area of focus is centered on assisting insurers with developing mobilization plans, performing impact assessment and modernization considerations for recent accounting changes, including IFRS 17 and US GAAP Targeted Improvements.

### Gavin Stewart - KPMG

**Breakout Session 2b:** Targeted Improvements

Gavin is a life actuarial manager with KPMG. He has over eight years of experience in the life insurance industry, and provides services to KPMG's clients in both an audit and advisory capacity. His current focus area is financial reporting and assessing the impacts of regulatory/accounting change, but his background encompasses a range of practice areas, including financial reporting, modeling, model validation, and actuarial transformation.

### James Xu - SAS

**Breakout Session 2c:** IFRS 17

James is currently the Principal Business Solution Manager at SAS Institute Inc. He holds global responsibility for SAS' IFRS 17 Solution's product design and development. Prior to joining SAS, James spent over 12 years in the life (re) insurance industry, and has extensively practiced in Asia Pacific, Oceania, and North America regions. James is a Fellow of Canadian Institute of Actuaries (FCIA), a Fellow of Society of Actuaries (FSA) and a Fellow of New Zealand Society of Actuaries (FNZSA).

Actuarial Society of Greater New York

**Jim Zhang - SAS**
**Breakout Session 2c:** IFRS 17

Jim is currently Senior Actuarial Consultant at SAS institute Inc. He support/leads a number of implementation projects for the SAS IFRS 17 solution. Prior to joining SAS, Jim has extensive experience in Canadian insurance space with a focus on IFRS measurement techniques, treatments and reporting for IFRS 17. Jim is an Associate of the Canadian institute of Actuaries (ACIA), and an Associate of the Society of Actuaries (ASA).

**David Ogloza - Deloitte**
**Breakout Session 2c:** IFRS 17

David is a senior manager within Risk Advisory and focuses on the Insurance Industry. He joined Deloitte in 2016 in Hong Kong, and relocated to Deloitte US mid 2018. He is an IFRS 17 specialist within the practice and worked on several IFRS 17 impact assessments and implementation projects. He is also strongly involved with the new FASB requirements on Long Term Duration Insurance contracts and which are similar in nature to the IFRS 17 requirements. He has extensive international experience in the insurance industry for over 10 years. He joined the firm after working for over five years at Insurance Europe - the European Insurance and Reinsurance Federation. In his former role he led the IFRS lobbying strategy for the European Insurance industry, notably regarding the development of IFRS 17 – Insurance Contracts.